

Lesson #1 - Add Families

Review (Optional)

This lesson is designed to get you familiar with adding families/accounts. You may wish to review the articles listed below before beginning.

- [Jackrabbit Basics Category](#)



The review articles in the bullet list below will open the Help article in a new tab. When you are finished reviewing the material, close the tab and return to this page to access the next article using the links below.

- [The Family Record](#)
 - [The Student Record](#)
-

Add a Family (Account)



If you already have your family and student information in another software system, we can assist you in importing it into your Jackrabbit system at no charge. Please see our [Imports](#) page for additional information on this process. Contact our Imports Team at imports@jackrabbittech.com.

To manually enter your existing family data, and whenever you need to add a new family to your system, the most efficient method is to use the **Quick Registration** form.

This form is essentially the same as the Online Registration form your parents will use to register from your website, but this form is used internally by your staff. Settings for the Quick Registration form follow the settings you choose for your Online Registration Form from the *Gear* icon > *Settings* > *Online Registration*.

When you are getting started, it is not necessary to customize the Online Registration/Quick Registration form. However, at a later time, it can be edited to include the fields that are important to your organization. See the [Online Registration](#) section for details on editing and customizing your registration form.

Add a New Family

To add a new family to Jackrabbit:


1. Go to the **Families** menu > **Quick Registration**.
2. Enter the information for the family and students. Fields marked with an asterisk (*) are mandatory fields.
3. You can submit the form without selecting classes for students, or you can choose to select classes and enroll the students now. For more detailed information on enrolling a student during Quick Registration, see the Help article [Enroll a New Student into Classes using Quick Registration](#).

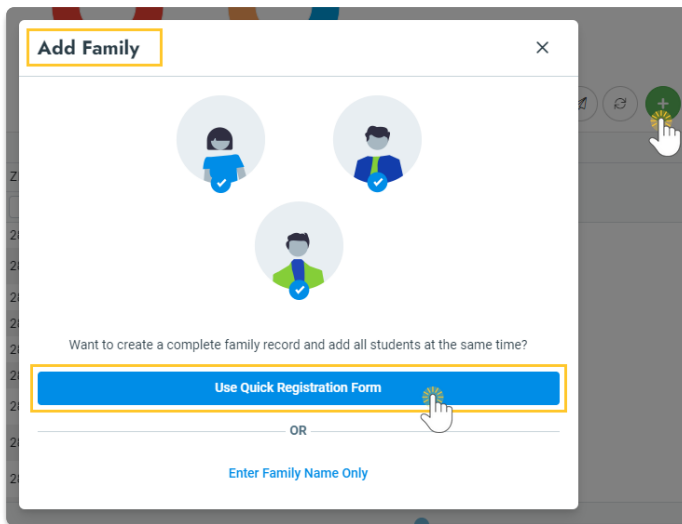


The details of the Quick Registration form are saved to the family's record and are viewable from the *Misc* tab > *View Registrations* button.

If you did not enroll a student during Quick Registration, there are several other ways to enroll students. For more details, see our Help article [Methods for Staff to Enroll a Student](#)

To accommodate different workflows, the Quick Registration form can also be accessed from the All Families page.

1. Go to the **Families** menu > **All Families**.
2. Click the **Add New Family** icon  to open the **Add Family** window.



3. Click the **Use Quick Registration Form** button to open the **Registration** form.

Jackrabbit's Duplicate Family Detection

Jackrabbit will try to avoid the creation of a duplicate family record whether it is a user adding a family at the front desk with the Quick Registration form or a family registering from your website with the Online Registration Form.

Quick Registration

The Quick Registration form for in-house registrations offers a *Duplicate Search* link that will alert you to any possible duplicates based on the *Family Name* entered.

Loc	Family/Acct Name	Status	Students	Address1	HomePhone	Balance
HELP	Claxton	Active	Lisa, Dana	123 McGregor Street	704-555-3434	150.00

If the search displays an existing record for the family, the user should exit the Quick Registration form and go to that family's record to update it and/or enroll students in classes.

If the record is not a duplicate and the remainder of the registration is completed, Jackrabbit will perform the family duplicate detection check when the form is submitted. This will look at, in this order: *Last Name*, *Zip Code*, and the *first 8 characters of the Home Address/Address 1*.

A match on these criteria will pop up the Family Duplicate Detection window, which displays the match and asks the question, "Is this the same family?"

- If **Yes** is clicked, the information in the Quick Registration form will be added to the existing record.
- If **No** is clicked, a new family record will be created.

Online Registration

A family's email address is required when registering online. If the email entered for **Contact #1** matches an email address already in your database, Jackrabbit will display a pop-up message directing the family to log into their Portal by clicking **OK**. They will not be able to continue with the Registration Form using the existing email address.

If no match is found on the email given, the form can be completed and submitted at which time Jackrabbit will perform the family duplicate detection check. This will look at, in this order: *Last Name*, *Zip Code*, and the *first 8 characters of the Home Address/Address 1*.

If a match is found based on these 3 criteria, Jackrabbit will update that family record with any new information included on the Registration Form (such as the addition of a contact). If no match is found a new family record is created. This may be the result of a misspelling or other minor discrepancy such as the '#' in front of a unit/apartment number and can result in a duplicate family record.



By directing your existing families (families that already have a record in your database) to enroll their students in classes through their Parent Portal, you can greatly reduce the occurrence of duplicate records. See [Parent Portal](#) for more information.

**Expand/Collapse
All**

Frequently Asked Questions

Quick Registration Form - Add a New Family and Enroll New Students in Classes

The **Quick Registration Form** is used by a Jackrabbit User to add a new family and enroll students in the family at the same time.


The Quick Registration Form follows the settings selected for your Online Registration Form. See our Help section [Customize your Online Registration Form](#) for more details.



Fields that are required on your Online Registration Form aren't always required on the Quick Registration Form. Since this form is used internally, it is **not** mandatory for office staff to fill out all fields to keep the process quick!

Access the Quick Registration Form

You can access the Quick Registration Form from the *Families* (menu):

- *Families* (menu) > *Quick Registration*
- *Families* (menu) > *All Families* and click the *Add New Family* (icon) . Click the *Use Quick Registration Form* (button) in the Add Family window.
















Add a Family in the Quick Registration Form

Complete as much of the *Family Information* section as possible. This will eliminate the need to add more details to the family record at a later date. There are some required fields designated with an asterisk (*).

Add Students and Enroll through Quick Registration

You can add up to 5 students in the *Student Information* section. Enter as much of the information as possible into the form. This will avoid additional work later on.

Use the **Search** button to search classes. Office staff can select up to 5 classes per student during the Quick Registration process. Additional classes can be added as needed after registration is complete.

Select Class #1	<input type="button" value="Search"/>	Enroll Date	<input type="text" value="05/20/2023"/>		Trial Enroll?	<input type="button" value="No"/>		Future Drop Date	<input type="text"/>		Email Instructor	<input checked="" type="checkbox"/>
Select Class #2	<input type="button" value="Search"/>	Enroll Date	<input type="text" value="05/20/2023"/>		Trial Enroll?	<input type="button" value="No"/>		Future Drop Date	<input type="text"/>		Email Instructor	<input checked="" type="checkbox"/>
Select Class #3	<input type="button" value="Search"/>	Enroll Date	<input type="text" value="05/20/2023"/>		Trial Enroll?	<input type="button" value="No"/>		Future Drop Date	<input type="text"/>		Email Instructor	<input checked="" type="checkbox"/>
Select Class #4	<input type="button" value="Search"/>	Enroll Date	<input type="text" value="05/20/2023"/>		Trial Enroll?	<input type="button" value="No"/>		Future Drop Date	<input type="text"/>		Email Instructor	<input checked="" type="checkbox"/>
Select Class #5	<input type="button" value="Search"/>	Enroll Date	<input type="text" value="05/20/2023"/>		Trial Enroll?	<input type="button" value="No"/>		Future Drop Date	<input type="text"/>		Email Instructor	<input checked="" type="checkbox"/>

*After registration, student can be enrolled in additional classes.

The options for enrolling during Quick Registration vary:

- If *Allow Trial Enrollment* is set to *Yes* on the selected class' *Summary* tab, you'll have the option of indicating whether or not the student is a **Trial Enroll**.
- If *Allow Future Enrollments* is set to *Yes* under the *Gear* (icon) > *Settings* > *General* > *Organization Defaults* (left menu) > *Class Settings*, you'll see an option to adjust the **Enroll Date** and add a **Future Drop Date**.
- If *Send Enrollment Email to Instructors* is set to *Yes* under the *Gear* (icon) > *Settings* > *General* > *Organization Defaults* (left menu) > *Class Settings*, you can clear the **Email Instructor** checkbox when you don't want instructors to receive an email. See our Help article, [Organization Default Settings - Class Settings](#), for more information.

Continue adding information and enrolling students in classes using the additional **Student Information** fields.



If you've entered an email for the contact(s) and want them to receive an email confirmation of the registration, be sure to select the **Send Email Confirmation** checkbox at the bottom of the form.

Enter Payment Information & Post Fees

In the *Credit Card Verification* section, enter the Credit Card or eCheck/Bank Draft information to be used for payment.

After all required information is entered, click **Submit Registration Information**. The **Post Enrollment Fees** window opens, and you have the option to post all fees immediately, check the classes to post fees for, add Registration Fees, and add Additional Fees.

Once all the fees are selected or added, select one of the buttons to complete the enrollment:

- Post Selected Fees Now
- Post Selected Fees & Pay Now
- Skip this... I'll Post Fees Another Time.

The family is added to your system, and any students with classes selected have been enrolled accordingly.



Policy Agreements cannot be accepted using the Quick Registration Form! To adhere to the Electronic Signature Act of 2000, a parent must log in to the Parent Portal to provide an E-Signature for company policies.

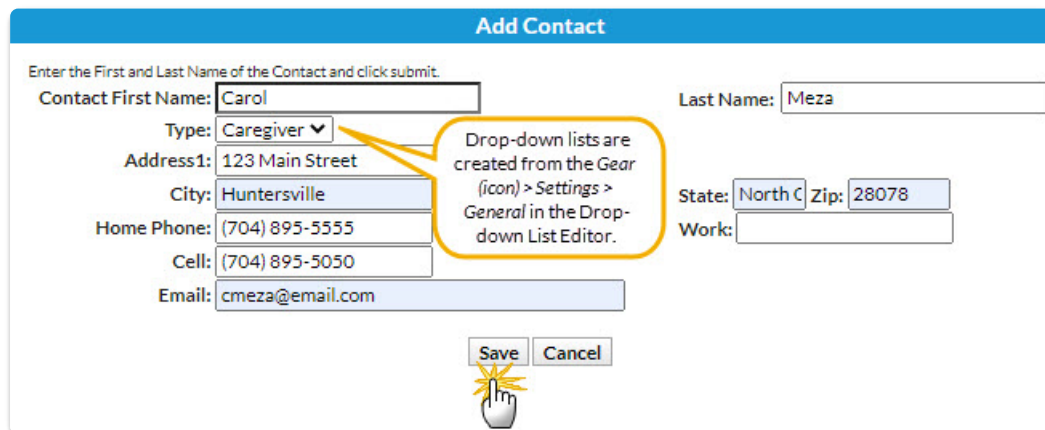
Contacts in the Family Record

A Family can contain as many contacts as needed and is not limited to parents. Additional contact types can be added by going to the *Gear (icon) > Settings > General > Drop-down Lists (left menu) > Family > Contact Types*.

Add a Family Contact

1. Go to **Families** (menu) > **All Families** to locate the family or use the global *Find a family* search at the top of a page.

2. Click **Add Contact** (button) on the Family record.
3. Fill in the information in the pop-up window.
4. Click **Save**. A new contact page is created and opens.
 - o Additional information that can be entered on a Contact's page includes employer details, driver's license #, birth month & day, social security #, address, and phone numbers, etc.
 - o By default, the first contact added becomes the Billing Contact. The *Billing Contact* is used when sending statements. Change the *Billing Contact* by selecting **Billing Contact = Yes** or **Billing Contact = No** as applicable and **Save Changes**.



The screenshot shows a web form titled "Add Contact". At the top, it says "Enter the First and Last Name of the Contact and click submit." The form contains several input fields: "Contact First Name" (Carol), "Last Name" (Meza), "Type" (Caregiver), "Address1" (123 Main Street), "City" (Huntersville), "Home Phone" ((704) 895-5555), "Cell" ((704) 895-5050), "Email" (cmeza@email.com), "State" (North C), and "Zip" (28078). There is also a "Work:" field. At the bottom are "Save" and "Cancel" buttons. A yellow callout box with a hand icon pointing to the "Type" dropdown menu contains the text: "Drop-down lists are created from the Gear (icon) > Settings > General in the Drop-down List Editor."



If a contact in the family record has more than one email address, add them into the Email field and separate the email addresses with a semicolon (;).

New Contact Page

Contact: Carol Meza

[← RETURN](#)
[SAVE CHANGES](#)
[DELETE](#)

Click link to return to the Family record.

Family [Meza](#)

First Name Last Name

Type

Member ID

Primary Contact
 Billing Contact
 Authorized to pick up student

Email, Phone Numbers, & Address

Email Mass Email Opt-Out [?](#)

Home Phone

Work Phone

Cell Phone

Fax

Other Phone

Address 1

Address 2

City State/Prov Zip/Post Code

Portal Information

[Reset Portal Password](#)

Login ID

Allow to login to Parent Portal
 Allow to manage absences and makeups in the Parent Portal

Last Login

Logins

Additional Information

Contact Birth Month Contact Birth Day

Drivers Lic.#

SSN/SIN

Employer

Job Title

Employer Phone

Employer Notes

Notes

Contact address and phone information is independent from the address/phone fields in the Family Summary tab.

The Parent Portal password can be reset here.



Changing a Family Address (on the Family Summary page) does NOT change a contact's address on the Contact's page. Changes to the contact's address must be done from the Contact page itself. Changing a Contact's Address does NOT change a family's address on the Family Summary tab. Changes to the family's address must be done on the Family's Summary tab.

Work With All Families - View, Search, and Take Action



Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward, review [User Permissions for All Families](#).

All Families, located in the *Families* menu, generates a list of all active and inactive family records in Jackrabbit. **Lead File** families are not included.

- ★ Use optional **data visuals** to view key information at a glance with interactive charts.
- ★ Drill down to specific families **using filters** organized in a slide-out filter drawer.
- ★ Save your **favorite view** (filters, selected columns, etc.) as your default view.
- ★ Display a list of families in a **powerful grid**: you can group, sort, and customize the information.
- ★ Take Action - **add a new family**, send a message, **work with a single family**, or **apply a mass action to multiple families** at once.


Sample All Families Grid

The screenshot shows the 'All Families' interface. At the top, there are breadcrumbs for 'Family status: Active' and 'Location: EDU' (callout 1). Below this is a filter drawer (callout 2) and a toolbar with icons for search, favorites, and more (callout 3). The main area contains five data visualizations: 'LOCATIONS' (Families by location), 'STATUS' (Families by status), 'ACCOUNTS RECEIVABLE' (30/55 Families w/ balances, Families w/ unpaid fees, Top 5 Balances), 'POLICY STATUS' (Families by policy status), and 'EPAYMENT STATUS' (Families by ePayment status) (callout 4). Below the visuals, it says 'Showing 55 of 184 Families' and 'HELP WITH GRIDS'. A table of family records is shown with columns: LOCATION, FAMILY, BALANCE, STATUS, ADDRESS, CITY, STATE, ZIP, PRIMARY PHONE, and STUDENTS (callout 5). A row menu icon is highlighted (callout 6), and a dropdown menu is open showing actions like 'ePayment Schedule', 'Family Discount', 'Family Fixed Fee', 'Membership Type', 'Clear UDF Answers', 'Print', and 'Export to Excel'.

LOCATION	FAMILY	BALANCE	STATUS	ADDRESS	CITY	STATE	ZIP	PRIMARY PHONE	STUDENTS
EDU	Agar	540.00	Active	234 Eldridge Lane	Huntersville	NC	28078	(999) 874-7991	Melody, Whitne
EDU	Ager	0.00	Active	1105 Holly Lane	Cornelius	NC	28031	(999) 999-6545	Dani, Dave, Bart
EDU	Alberts	0.00	Active	4897 Holt Street	Davidson	NC	28036	(999) 815-2485	Taylor, Brandon
EDU	Ashton	0.00	Active	9883 Annabelle Lane	Davidson	NC	28036	(999) 999-8259	Leigh, Linda, Lor
EDU	Bailey-Skidmore	300.00	Active	10098 Poppy Lane	Huntersville	NC	28078	(999) 999-2688	Anne
EDU	Bangor	0.00	Active	1961 Sycamore Road	Huntersville	NC	28078	(999) 999-4387	C.J.
EDU	Barnhardt	595.00	Active	9872 Poplar Lane	Huntersville	NC	28078	(999) 999-5555	Virginia, Sarah, Max

- 1 Breadcrumbs display the currently selected filters.
- 2 Data Visuals provide family information at a glance.
- 3 Open filters (filter drawer), Save as favorite, Favorites, Hide/Show Data visuals.
- 4 Adjust columns, Send a Message, Refresh Grid, Add New Family, and More.
- 5 Column Search - enter a search term in the search field.
- 6 Row Menu - use the row menu to perform an action for an individual family.



Click the Adjust columns  icon to squeeze the grid columns closer together. You will be able to see all the columns in the grid.

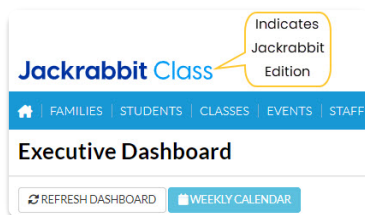
**Expand/Collapse
All**

- ▢ Data Visuals - Key Information at a Glance
- ▢ Use Filters to Search for Specific Families
- ▢ Save your Favorite Filtered Grid Views
- ▢ Work with the Information in the Grid (Table)
- ▢ Add a New Family
- ▢ Take Action for an Individual Family
- ▢ Take Action for Multiple Families (Mass Actions)

Practice - Add a Family

Want to practice what you've just learned? Great!

- Go to <https://app.jackrabbitclass.com/jr4.0/Login> and log in with the credentials below for your Jackrabbit edition.
- Go through some or all of the practice scenarios below as they apply to you.



Edition	User ID	Password
Cheer	LMSCheer	Training1
Class	LMSClass	Training1
Dance	LMSDance	Training1
Music	LMSMusic	Training1
Swim	LMSSwim	Training1



The Practice Database is refreshed each day at approximately 5:00 am Eastern Standard Time. Anything you enter will be erased at that time.

Determine the family/student information your organization requires for each family.



Use fake names, addresses, etc. as any information you add could be viewed by others outside of your organization.

- Make up your own fake names or click [here](#) to open a website that generates fake names.
- Make up your own fake addresses or click [here](#) to open a website that generates fake addresses.

Add a family with a fake name and address.

1. Go to Families > All Families. Click the Add Icon and then Use Quick Registration Form button.
2. Enter the information for the *Family* and *Student(s)*. Fields marked with an asterisk (*) are mandatory fields.
3. You can submit the form without selecting class(es) for student(s) or you can choose to select classes and enroll the student now.

QUIZ - Lesson #1 - Add Families

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #1 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent. The quiz includes Review questions.

Quiz #1 - Add a Family/Account

TAKE THE QUIZ

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
9	9	8	7	6

[Return to Front Desk Staff Menu to continue to next lesson](#)

[Click here to provide feedback for this lesson](#)
